Initial Assessment Contacts

Note: In order to create a case note, an assignment to the case is not needed.

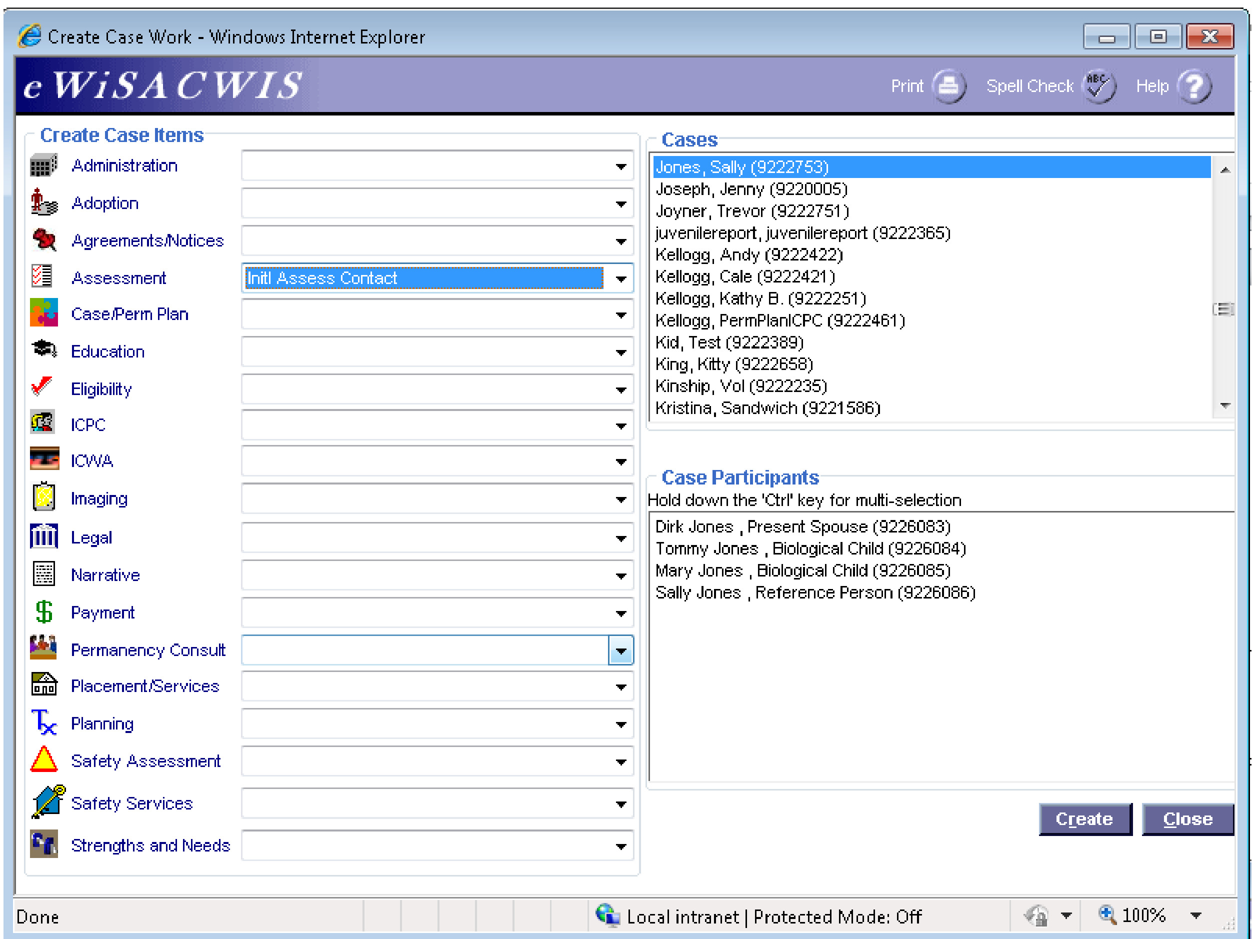
Creating Case Notes on Assigned Cases

1. Create an initial assessment contact case note using one of two methods:

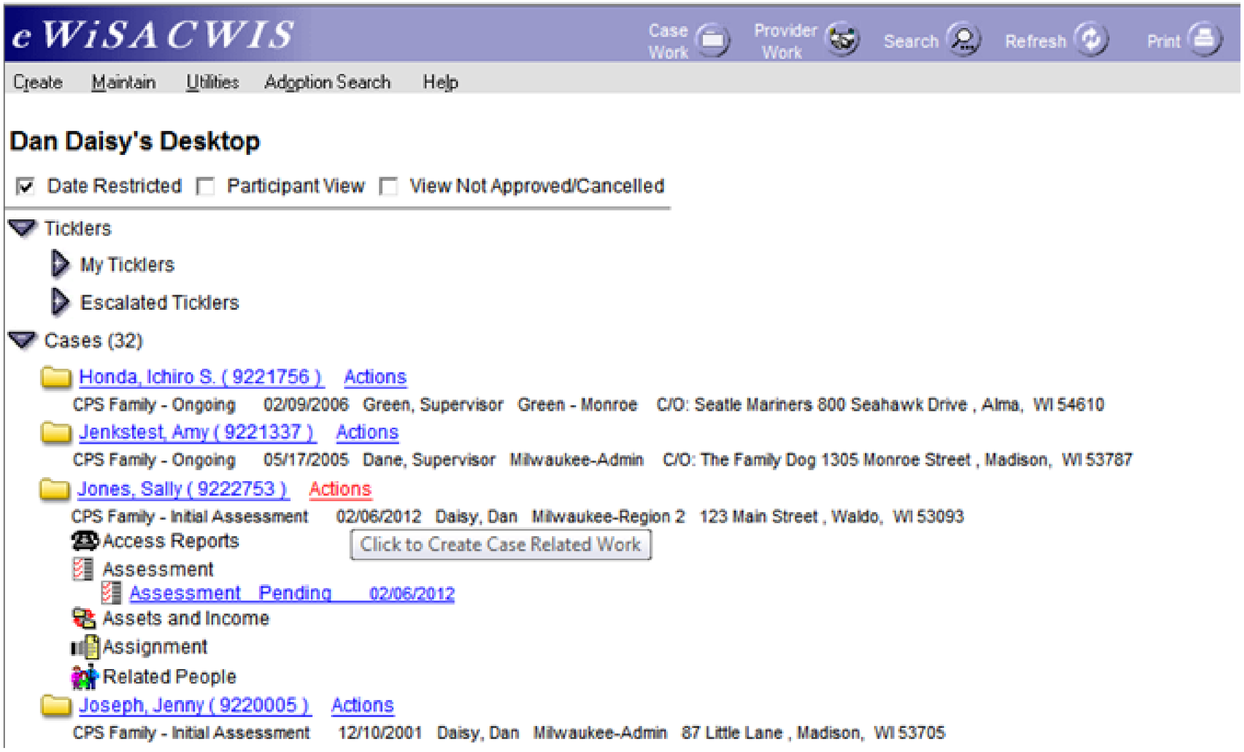
   a) From your desktop, click the Case Work hot button 

. This will open the Create Case Work page.

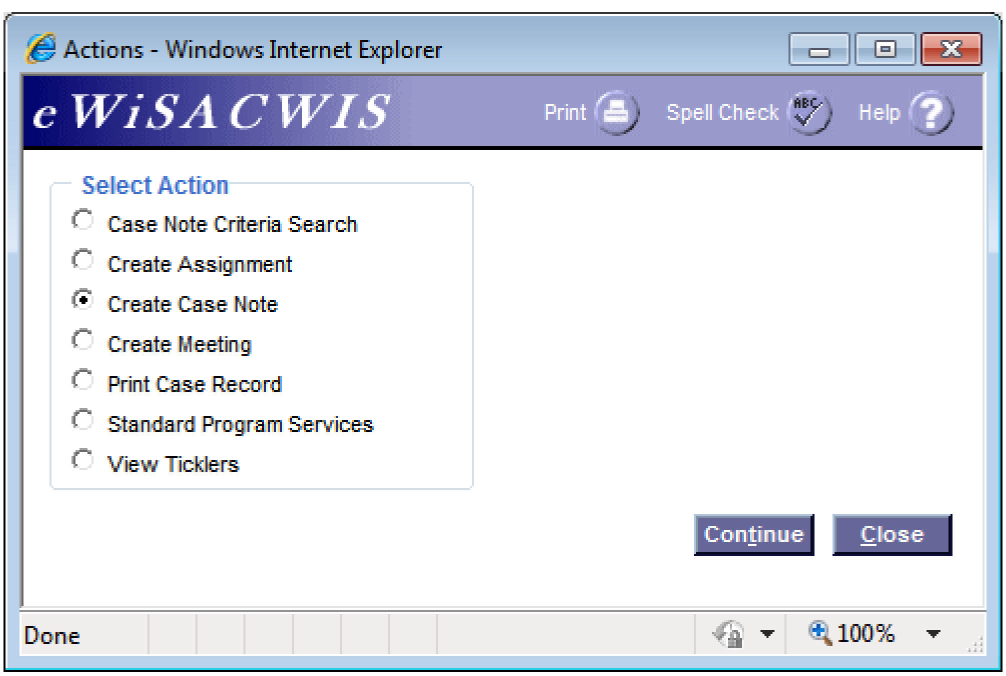
   Select the Initl Assess Contact from the Assessment drop-down and select the Case. The selection of case participants is optional; use the 'ctrl' key to select more than one participant. If the contact is with someone who is not a participant with the case, do not select a name. Click Create. This will open the Case Notes page.



b) From your desktop, click the Actions hyperlink next to your case. This will open the Actions page.



On the Actions page, select Create Case Note and click Continue. This will open the Case Notes page.



2. On the Case Notes page, the top of the page pre-fills with the Case Name, Worker Creating Note, Worker Making Contact, and Date Entered. There is an option to Search out the Worker Making Contact if it is not the same as the person entering the case note. The note can be saved and updated for up to 30 days after it is created. When the Note Finalized checkbox is checked, 30 days have passed, or the Assessment is approved by a supervisor, the note will be frozen and no longer editable.

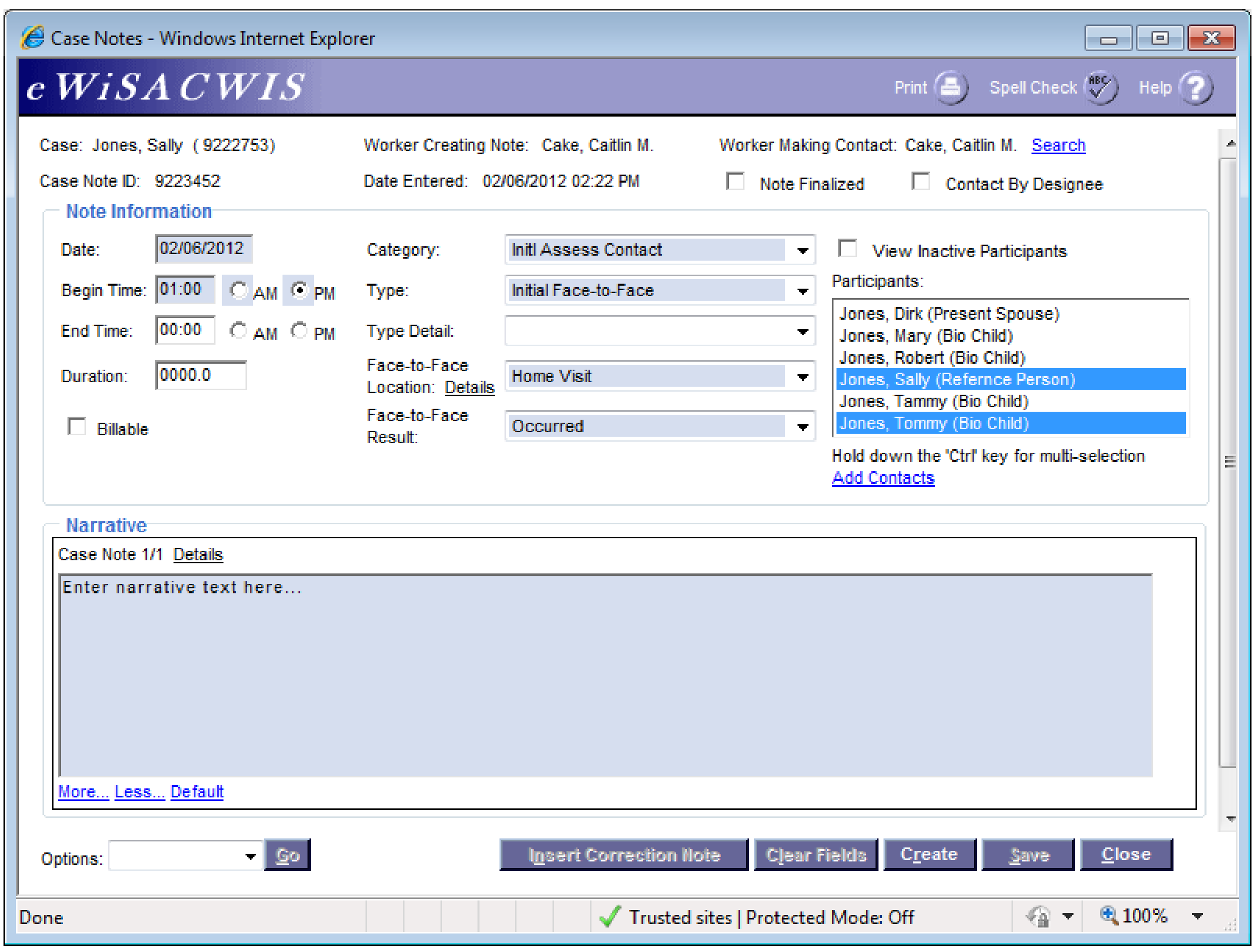
3. In the Note Information group box, the Date and Begin Time are required user entered fields. Case Notes created via Create Casework will automatically pre-fill the Category and Type with Initl Assess Contact and Face-to-Face, respectively. If creating the Case Note via Actions, select these values on the Category and Type drop-downs.

4. The Face-to-Face Location and Face-to-Face Result are drop-down value fields. Select a value that best describes the Assessment Contact Type.

5. The Participants in the case, which includes case participants and collaterals, display on the right side. You can use 'Ctrl' key to multi-select additional participants.

6. The Narrative group box is a user-entered field. Enter a narrative describing what happened during contact with the individual(s). For case worker contact policy guidance, place your mouse over the 'Details.'

7. Notice the scroll bar to the right. The page is too big to display the entire contents. Use the scroll bar to view the bottom of the page.

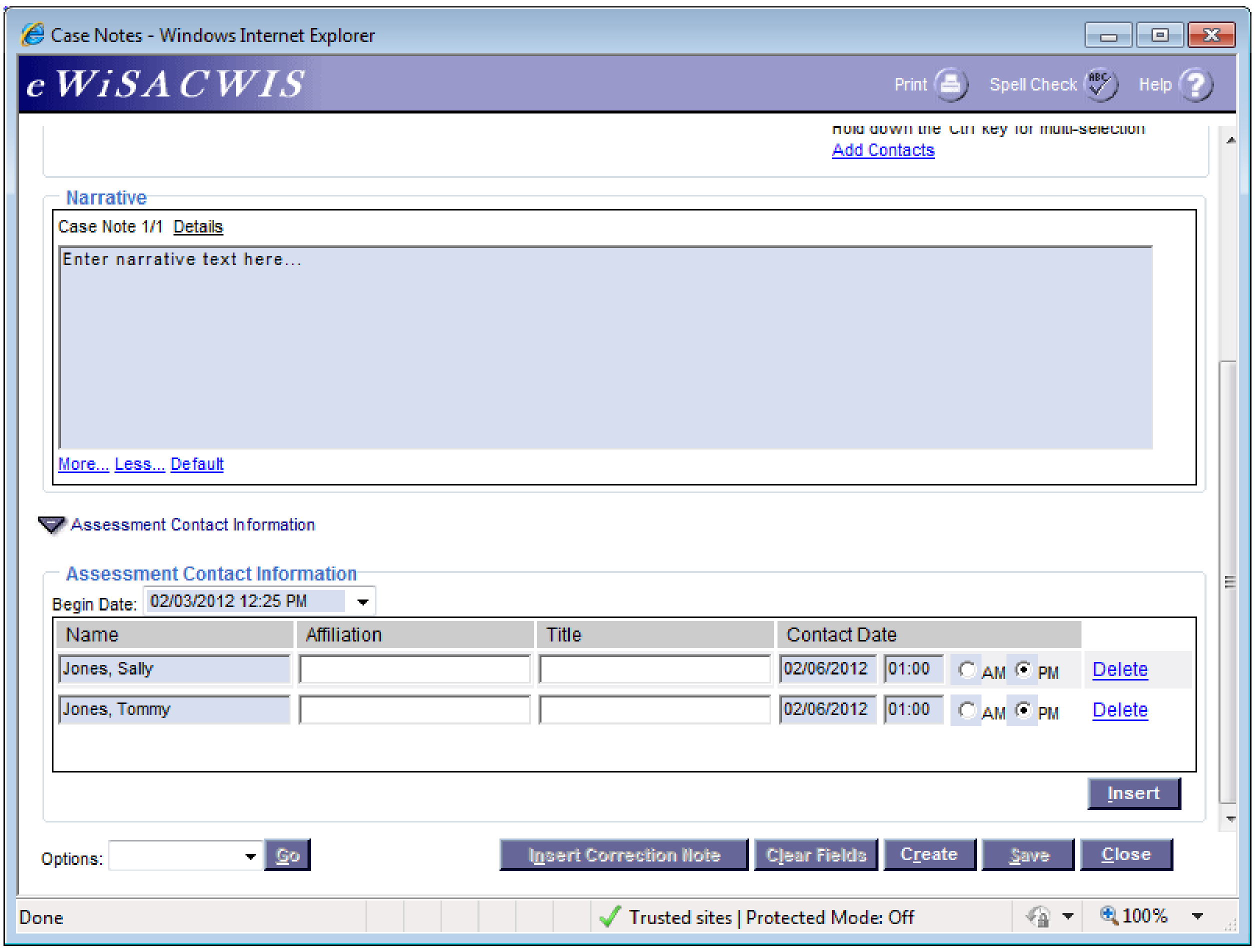


8. Below the Narrative group box is an expando with Assessment Contact Information.

The Begin Date field is a drop-down value displaying the 'Date and Time Report was Received' for screened in access reports. Click on the drop-down value field to view other dates. Select the correct date on which the contact took place.

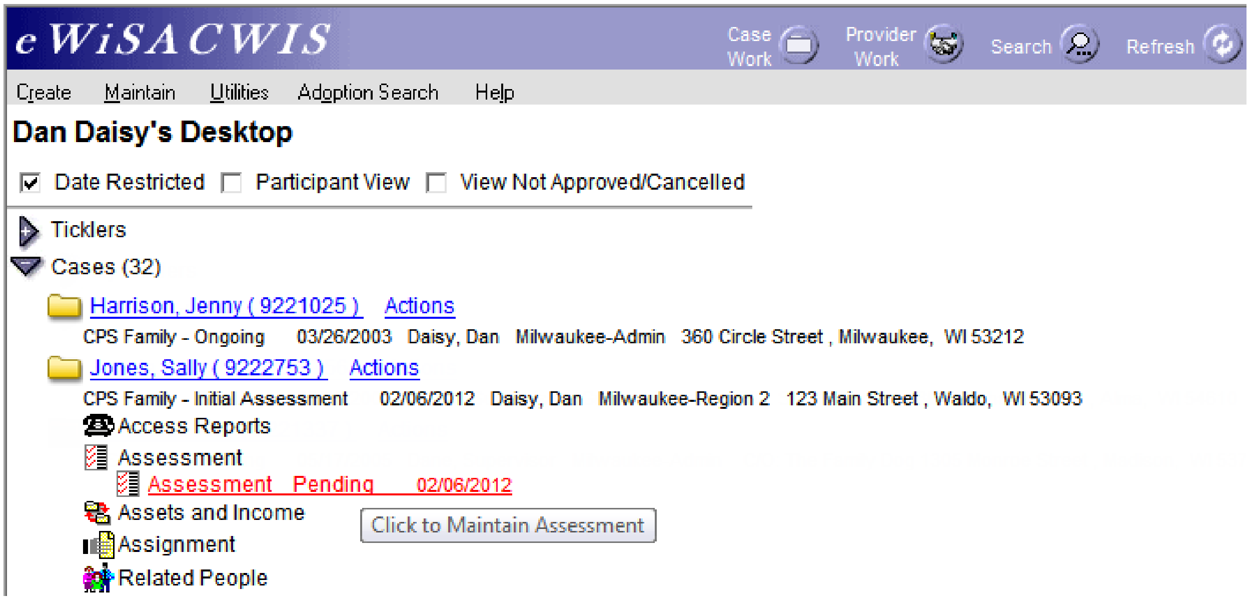
The Name and Contact Date are user-entered mandatory fields. If a mistake is made, use the Delete hyperlink to remove the information entered.

The Insert button will allow additional Assessment Contact Information to be entered. The 'Add Contacts' hyperlink below the participants will also add those contacts to the Assessment Contact Information group box.

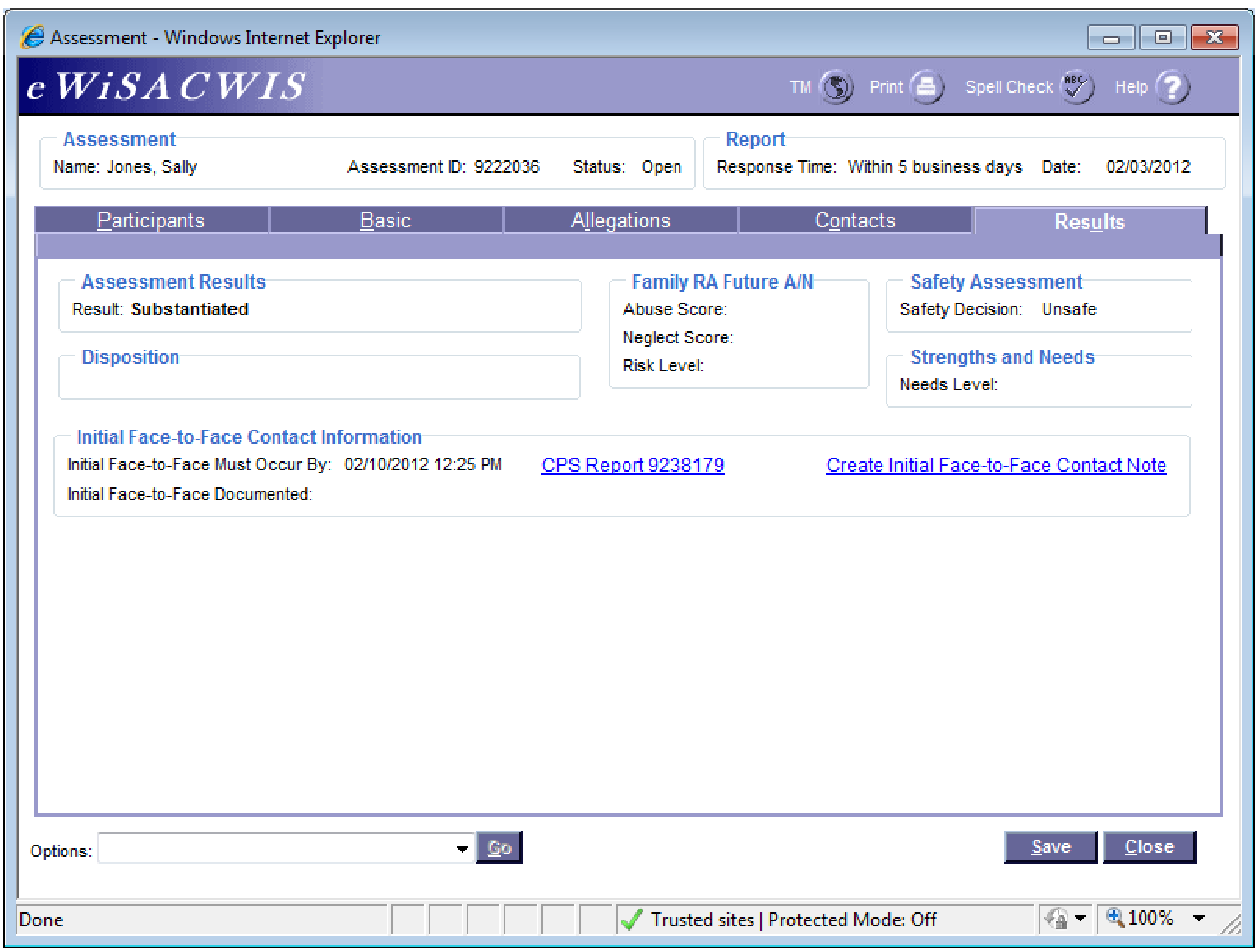


9. Finally, when completed, click on Save and Close. This information will be saved under the Assessment icon and will pre-fill the Initial Assessment with the contacts names and dates.

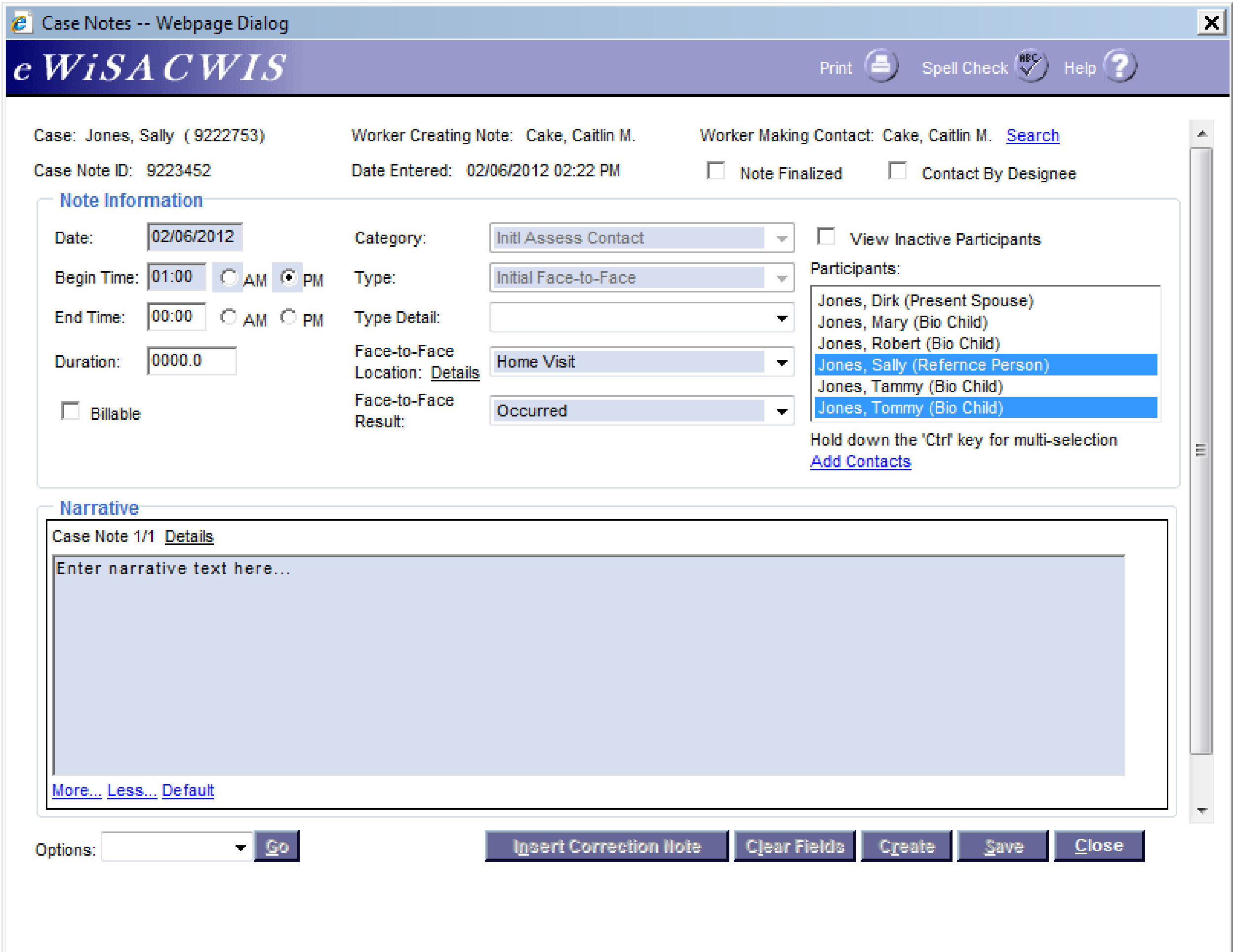
10. To create an Initial Assessment Contact from the Assessment, click on the pending Assessment from your desktop. This will open the Assessment page.



11. On the Assessment page, click on the Results tab. In the Initial Face-to-Face Contact Information group box, click on the Create Initial Face-to-Face Contact Note hyperlink. This will open the Case Note page.



12. On the Case Note page, the Category and Type will pre-fill.



13. In the Note Information group box, enter the Date and Begin Time.

14. The Face-to-Face Location and Face-to-Face Result are drop-down value fields. Select a value that best describes the Assessment Contact Type.

15. The Participants in the case are shown on the right side. You can use ‘Ctrl’ key to multi-select additional participants.

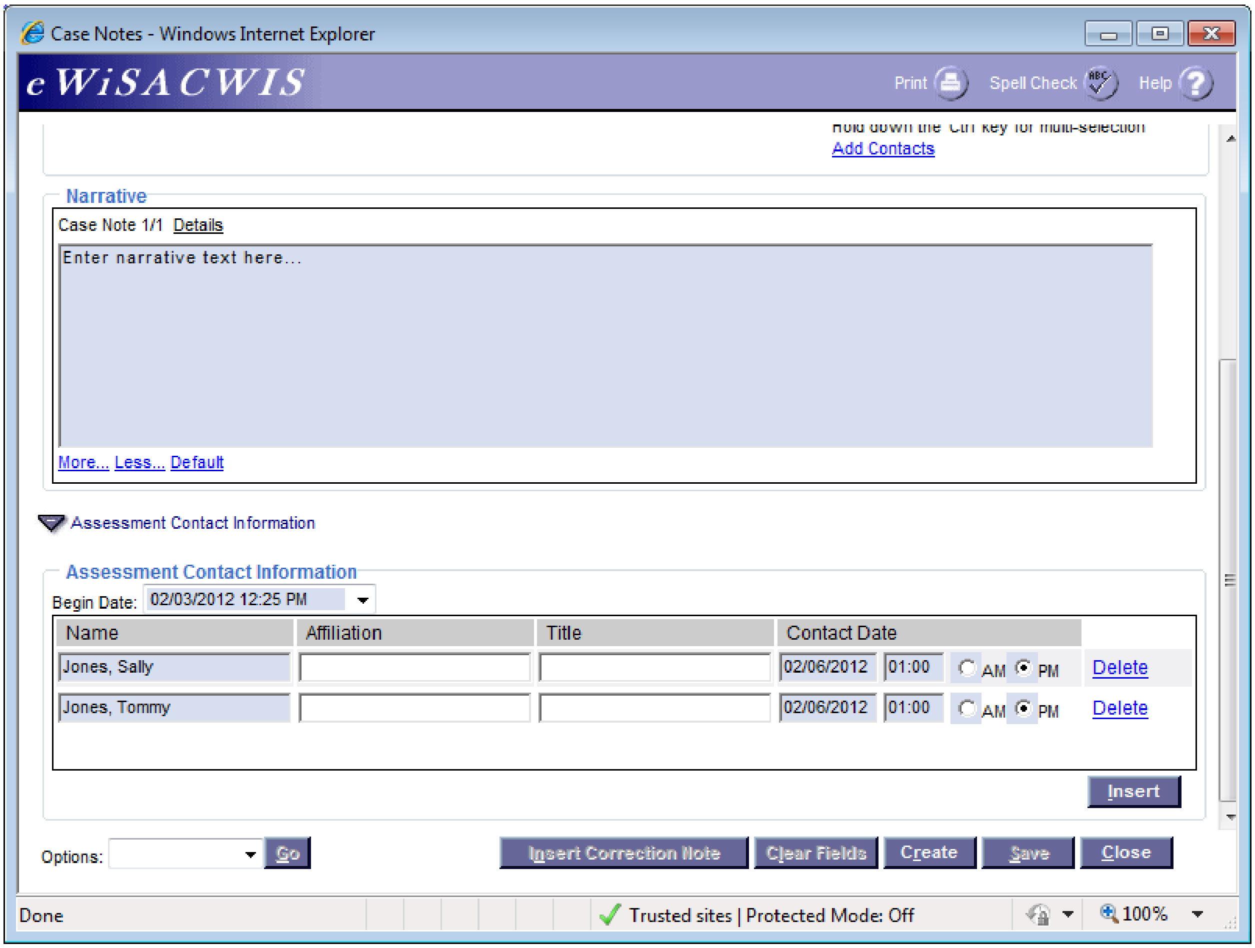
16. The Narrative group box is a user-entered field. Enter a narrative describing what happened during contact with the individual(s). For case worker contact policy guidance, move your mouse over the ‘Details’ flair.

17. Scroll to the bottom of the page to update the Assessment Contact Information group box.

18. The Begin Date field is a drop-down value displaying the ‘Date and Time Report was Received’ for screened in access reports. Click on the drop-down value field to view other dates. Select the correct date on which the contact took place.

    The Name and Contact Date are user-entered mandatory fields. If a mistake is made, use the Delete hyperlink to remove the information entered.

    The Insert button will allow additional Assessment Contact Information to be entered. The ‘Add Contacts’ hyperlink below the participants will also add those contacts to the Assessment Contact Information group box.



19. Finally, when completed, click on Save and Close. This information will be saved under the Assessment icon and will pre-fill the Initial Assessment with the contacts names and dates.